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ABSTRACT

In a recent study of the Tampa (Florida) market, TRAC Media Services acquired some interesting information about the market's response to its two public television stations. WEDU is a VHF-signal community station that reaches about 745,000 households in a week, and WUSF is a university-licensed UHF station that reaches about 547,000. Month-long metered viewing data from the Tampa area were purchased from the Nielsen rating service. Of the metered homes in the market, 86% had viewed 1 or both of the public stations in the past 28 days. In fact, 48% of households had watched on 14 days or more, and 21% had watched on 21 days. Only 10% of the homes viewed only 1 genre on public television. In addition, 75% of the core audience for public television consisted of households without children. There were no significant differences in terms of education, age, sex of household head, or cable status for the core viewing households. Nature/travel and how-to shows accounted for the largest share of the viewing (73% and 57%, respectively) on both stations. Unique programs telecast on WUSF did not demonstrate much viewer appeal. The relationship between the two stations in terms of competing for viewers and the use of two stations for time shifting of programs viewed will be the subjects of further research. (SLD)

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Public Television Viewing In A Dual Channel Market:

Some Big Surprises!

by David and Judith LeRoy

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In a recent study of the Tampa market, TRAC Media Services acquired some provocative information about the market's response to its two public television stations. Indeed, the study showed us that we must change many of our stereotypes about the role of a second public television station in a market.

But this study was inordinately rich and offered other unexpected findings: it showed that some widely held beliefs about public television viewing are absolutely incorrect. Thanks to a new approach using individual household respondent data, we were able to uncover some startling facts — facts public television stations can use to improve service to their viewers and that can enhance, in turn, the viewers' use of what we offer them.

This study was initiated by the stations themselves. Interested in examining and defining their roles in the Tampa market, WEDU and WUSF jointly funded the study. One station, WEDU, is a VHF signal station that reaches approximately 745,000 households in an average week. WUSF is a UHF station that reaches 547,000. The stations' broadcast hours are similar, but WEDU is a community station while WUSF is a university licensee. The stations are to be commended for the manner in which they have pursued the question of "how best to serve our shared community." The data will help many other stations in their efforts to do the same. TRAC Media Services, with a perennial interest in this issue, provided the analysis, gratis.

What was so different about this study? Two things, for a start:

1. Up to now, public television has lacked "respondent-level" viewing data. We simply could not, with the data available, examine a specific household's viewing habits. We have always been restricted to averages. And you know the problem with averages: if a 68 year old man and a 2 year old baby are the only viewers for a program, the average age of the viewer is 35! In this study we got respondent-level metered household data. And that's what changed our perceptions.

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2. Also, the weekly cume public television is forced to live with is a problem. It suits commercial stations' schedules and commercial stations' viewing patterns, but public television has a different rhythm. With its varied and diverse program genres, specials, and short series, the viewing and sampling habits of its viewers are unique. Thus, when we planned this study, we watched the same sample of viewers over a month and were able to observe viewing choices and patterns that would not have been apparent in a week. Since Tampa is metered, this was possible. We contracted with Nielsen to purchase quarter-hour viewing data for the 28-day May sweep for both stations.

In studies of this sort (using metered homes) a typical concern is sample size. Our worries were unfounded. A full 86 percent of the metered homes in the market had viewed one or both of the public television stations in the last 28 days.

What's Different?

What did the study reveal that was so provocative? Let's start with general viewing data. The results modified our thinking:

1. Debunked: People don't watch much public television. The typical public television viewer is a very casual viewer, watching a couple of times a month. We don't have a "Core Audience" like the one that exists for radio.

Previous data led us to believe this might be true. Due to the format of our Nielsen data, the existence of a "Core Audience" eluded public television researchers. We had always known that many people sampled us, but our data only offered the equivalent of "the average viewer's" viewing habits. We lacked individual month-long response data that would show a surprising number of those viewers watched us a lot.

In this study, the ability to weed out the influence of light viewers and the channel surfers gave us new perspective. We found that 60 percent of the homes that viewed public television in Tampa in a month (May, 1994), viewed the stations just about every week. In fact:

48 percent of the households viewed 14 or more days
21 percent viewed 21 or more days during the month

So, *more* people watch *more* public television than we earlier thought. There is a core audience. We simply couldn't find it because we lacked the necessary equipment—the microscope that found the first bacteria, if you pardon the metaphor.

In this study, the other two viewing groups that emerged were "Peekers"—folks who only watch public television once or twice a month; and "Monitors"— who, like the "Core" group, watch public television weekly. The difference between "Monitors" and "Core" viewers? The frequency of "Monitor" viewing falls short of the 15+ viewing occasions viewed by "Core" viewers in a month.

2. Debunked: Most people come to public television for their favorite kind of program: drama, nature, how-to. Then they leave. So public television audiences are made up of small slivers, each watching a different kind of fare.

Not true. The Tampa study showed that this view simply isn't correct. *Only 10 percent of the homes viewed only one genre.* Most homes viewed an average of *four* genres on WEDU and *three* on WUSF. And that's only the average. The Core viewers—those 18 percent of the homes in the Nielsen sample who watched more than 15 days a month and over three or more weeks—watched about *ten of the twelve possible genres* in a month!

3. Debunked: Any possible "Core audience" for public television would reside in the children's audience, an audience that comes daily for *Sesame Street* and the other kiddy fare.

It's true that many of the homes with children were in the Core audience. But these households with kids constituted less than 25 percent of the Core group's households. So 75 percent of the Core audience for public television consists of non-child households.

Interestingly, those households watching kids' shows were quite different in their public television viewing habits from what we had assumed—a fact which debunks another myth.

4. Debunked: The children's households come to public television for one thing: viewing children's programs. They do not view much in the rest of the schedule, thus they have poor membership potential.

Absolutely untrue. *Eighty-five percent of the households with a child view both prime time and non-prime time programming.* In the past, it was assumed that much of the audience for children's programs was an exclusive daytime audience. These data suggest that other portions of the schedule are indeed sampled and viewed by the households with children; *i.e.*, that the parents also are public television viewers, in different dayparts.

5. Debunked: The Core audience, if there is one, is "older than the hills" and lives mostly in non-cable households where viewing options are limited and the residents watch whatever they can get, even public television.

Wrong again. There was, in fact *no significant difference* in terms of education, age, sex of household head, nor cable status for the Core viewing households. So far, demographics haven't proved very useful in defining our Core audience. We need further research on this issue. We need to know more about this group. Such as, for example, how many of them are members? And, if the news is good, how do we turn other viewers into Core audience members?

Dual Station Viewing

The Big Question(s)

The Tampa stations' motivating question was how the market used them. The primary reason the study was undertaken was that the stations wanted to understand market viewing mechanics. This understanding could, hopefully, help them better serve local viewing needs. Thus, we started the research with a number of related questions: 1) How well did the stations reach viewers in the community? 2) Did the stations share these viewers? 3) What were the viewing preferences in the market? and 4) Did the viewers come to each station to satisfy *different* viewing needs?

All of these questions were answered, and many more as well.

Question 1: How many people viewed?

Most of the market. The combined cume for both stations was 86. Note, in the following table, that the 28-day cume for each station is substantially larger than the 7-day cume, reinforcing our assertion that public television viewing rhythms differ from commercial stations' and vindicating our insistence on a 28-day study.

HOUSEHOLD REACH

Cume	WEDU	WUSF
7-Day	52	39
28-Day	77	64

The table also shows that the second station attracts less sampling than the primary one. This is a typical finding in multi-station markets. Reasons for the second-station penalty: 1) the second station is usually a UHF signal and has

more limited signal coverage in the market; 2) it may lack a broad range of appealing programming; and 3) it may have a strong on-air commitment to ITV that attracts very small audiences during certain dayparts. In markets with signal parity and similar program dollars, both stations will have similar cumes and GRP levels.

Question 2: Did the stations share viewers?

The conclusive answer to this question is yes. A large proportion of the market's public television audience uses both public television stations: 65 percent viewed both stations; 26 percent viewed only WEDU; and, 9 percent viewed only WUSF.

Do households who watch only one station differ from those who watch both channels? Absolutely. They watch far less public television. They are, indeed, the "occasional" viewers we so often mistakenly imagine to be our "norm." Households that viewed only one of the Tampa public television stations watched on fewer days, for fewer quarter-hours, and on fewer occasions.

What kind of households watch both stations? Households with children are more likely to view both stations than households without children. Pay-cable households are more likely to view both stations than no-cable or basic-cable-only households. Clearly, pay-cable does not reduce the public television cume or a household's inclination to sample both stations in the market.

So, the shared use of public television stations is extensive; this fact requires a more-than-slight realignment of how we visualize the role of the second station in a market.

Question 3: What did the viewers watch?

We examined household viewing by program type to answer this question.

In this study, we used the same program types we have used over the years for classifying programs—genres that have proved adequate to the task. Here is a table summarizing genre popularity in the market. The table presents the percentage of the total viewing sample that watched each program type at either or both stations.

Program Type	% View
Nature/Travel	73
How-To	57
News/Talk	48
Documentary	47
Music	42
Children	42
Science	42
Drama	38
Film	27
Comedy	21
ITV	18
Culture	6

There were two program genres that accounted for a lion's share of the viewing cume at both stations: Nature/Travel and How-to.

Question 4: Did viewing choices differ at the two stations?

Fascinating fact: the program types eliciting most viewing on both stations were exactly *the same.* Homes that viewed both stations usually viewed the *same* program types on both stations. *Almost 60 percent of the folks who viewed Nature/travel on WEDU also watched it on WUSF. The same goes for How-tos.* These viewers were obviously not seeking "alternative choices." They were watching the same fare on both channels!

The findings on the other program genres were similar: the ranked order of the cumes at both stations was quite similar as long as both stations had a relatively equal amount of programming within the genre. (WUSF, as a LUD station, fell short on a number of genres.)

What Else Did We Learn?

Genres, program affinity and unique cumes

As mentioned earlier, the households in this study rarely watched only one genre—*e.g.*, only Drama, only News, only Science. The affinity between Nature and How-to programs was, in fact, so close that they are best considered a mega-genre in this market. Seventy-two percent of the households watching How-tos also watched Nature/travel on WEDU; almost 50 percent who watched Nature on WUSF also watched How-tos. By itself, the How-to genre creates little new audience since so many of its viewers also watch the Nature genre.

For many years, we believed that public television's diverse fare was watched by diverse groups—a sliver here, a sliver there—and that added up to the total audience. This study suggests that households in the audience are much more eclectic in their viewing taste than we ever imagined. Almost all of the Tampa audience for News, Drama, Documentary, Comedy, Science and Film had already partaken of other station fare. Two genres are more apt to have unique audiences—to bring new audiences to public television. Those two program types are Children's and Contemporary Music. The children's genre has a unique cume of 11; popular music (primarily *Lawrence Welk*), 14.

Alternative programming

The unique programs telecast on WUSF—programs that attempt to provide an alternative for the viewer—alas, fared poorly. The viewers simply preferred the more popular genres on both stations.

The effort to find alternative programming for secondary stations is a daunting task. Most alternative programs simply are not cume builders. The most successful alternative programming for a secondary station in a market like Tampa would be programming that builds on the mega-genre of Nature/Travel/How-To. The most successful scheduling ploy for both stations would appear to be counterprogramming, when strong programming is available (*e.g.*, *Mystery!* against *Nature*). When none is available, then the logical option at each station would be to schedule consecutive programs with similar viewing affinity—programs into which an assembled audience may flow.

What Now?

This study, as most good studies do, points the way for new research. This study needs replication in other markets to assure that the findings in the Tampa market have universality. And the study *will* be replicated, thanks to promised funding from the Corporation for Public Broadcasting and contributions from stations in the markets that will host similar studies: Washington/Baltimore and San Francisco/San Jose.

In these studies, we must also answer other questions pertaining to multi-market stations:

Do the viewers use the stations for time shifting?

How much "possible" viewing does a second station subtract from the primary station? Or conversely, how much additional public television viewing does the second station add in the market?

What is the influence on fund-raising in a market that has multiple public television signals?

There are, of course, many other questions involving viewers' use of public television. For example, what are the prevailing genre viewing patterns? How can we use information about these patterns for on-air promotion, to bring viewers back into the schedule for other public television fare? What determines the different genres a household views? How do we measure

attributes and qualities in programs that encourage cross-genre viewing? Why will How-to viewers watch *Nature* and *Mystery!* viewers, *Nova*? These questions lead us into the exciting new area of program affinity.

The study of affinity appears to be the missing link in our on-going attempt to devise appealing schedules that flow... schedules that enhance the viewing public's use of public television stations... schedules that create the loyalty which induces viewers to support their viewing choices with membership dollars.

The Tampa study is a wonderful ramp on which to begin a serious pursuit of viewer and membership questions that have eluded us in past research adventures. The Tampa study and the ones that follow will open new doors of inquiry, change erroneous assumptions and, hopefully, help public television professionals fortify the already strong bond between public television and the local community. Information gleaned from studies such as these will help keep us on course in a complex, sometimes perplexing future. The Tampa stations are to be commended for providing the motivation and resources to begin our journey.*

Dr. David LeRoy and Dr. Judith LeRoy are co-directors of TRAC Media Services (formerly known as PMN TRAC) in Tucson, Arizona.

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**This is a brief summary of findings from the Tampa Dual Channel viewing study. A more detailed review may be obtained from TRAC Media Services, P.O.B. 65120, Tucson, AZ 85728.*